

National Development Plan

BULGARIA

November 2017

Introduction

Over the years a number of public, state, and private institutions have conducted various types of empirical social research. They include sociological, social-psychological, economic (including marketing), demographic, public relations, and other types of research. A massive amount of data has been produced from that research. These data are left for storage with the clients who commissioned the research or the contracting bodies who conducted the studies. Different public and private institutions have built their own databases. Access to them is very difficult, and in many cases it is impossible. This outlines one of the most serious challenges that the project faces - the need to ensure a consensus on providing these data archives. Another problem is that of the needed consensual agreement with the National Statistical Institute for the differentiation of the tasks of storage, access and service for users of scientific social research information at the Study of Societies and Knowledge at the Bulgarian Academy of Sciences (ISSK-BAS). In general the studies realized with public funds should be made public – with public access to the data produced by the conducted social research. The solving of this task depends on normative regulation. The problem with the ownership of private databases is more complex, as it requires consensus agreements.

At present, however, in Bulgaria there is no national institution responsible for a central storage, management and access to the collected empirical data from social research. At the moment this is partly done by the National Statistical Institute, but still the majority of the databases are kept by various state and private institutions. In most cases, the data become property of the institution that ordered the research, and although it was carried out with public funds, access to the data is difficult or lacking altogether. Currently, a significant share of such data is produced and kept by ISSK-BAS. At the same time, in most European member states there are trends towards the creation of institutional and normative prerequisites for generating and organizing unified datasets from different types of studies. Additionally, special attention is paid to the implementation of policies of consensus on the storing, management, access, and analysis of the generated database.

The existing organization of social research data and their use for scientific purposes in Bulgaria have at least four major drawbacks:

1. **Databases are physically dispersed;** they are cut off from each other. The existence of some of the databases is often not even known. This seriously hinders access to them. Researchers are forced to make special efforts to gain access to such data - and, despite the efforts made, there is no guarantee of gaining access to the information sought.

This creates serious difficulties for the deployment of comparative studies in Bulgaria and for the advancement of scientific thought in general. The limited access to data from already conducted social research leads to the fact that studying of many key social indicators and problems of Bulgarian society often starts “from scratch”, which further increases the cost of the empirical studies of the Bulgarian society. If the data are adequately managed and available (under certain conditions), this will save researchers the need to start from the beginning of every new study, and it would create a factual basis for conducting comparative research in dynamic, structural, local and international aspects.

The lack of serious comparative studies explaining the ongoing social processes in Bulgaria in the period of transformation is one of the main disadvantages of the Bulgarian scientific studies at present. This disadvantage can be overcome by building a unified system for storage and management of the data from the studies conducted in Bulgaria.

2. **The databases are organized in different ways** and by using different software products. This circumstance creates real methodological, organizational and other obstacles, and narrows the possible use of the data by a wider range of interested users. It hinders the use of databases from different sources and makes it impossible to conduct a comparative analysis of the studied social processes and phenomena.
3. **Access is not always permitted** due to confidentiality claims regarding the results of ongoing research.
4. Database creation and organization is done by using the **available capacity of the respective institution** (in the Bulgarian context in many cases that has a negative effect and **limits the proper storage and management of the data**).

All of the above-mentioned drawbacks decrease significantly the efficiency of the use of data in several ways:

1. Limits significantly the access to sought data;
2. In some cases they limit the possibility of choosing the adequate research design (for instance data which is of interest to users has already been produced and making expenditures for collecting the data anew is not justified);
3. The opportunities for comparative research are very narrowed, as well as the methodological assistance and evaluation of possible gaps in the realization of empirical research.

Considering the situation described, this project is proposed as a solution for the dispersion, lack of professionalisation, and inappropriate practices of storing data from social research in Bulgaria.

The idea of creating a united national depository and a digital storage of data is not new, but its realization up to now has been seriously hindered by the lack of financial means to help start the creation and development of such a system.

The sociologists at the ISSK-BAS (which succeeded in 2010 at the Institute of Sociology at BAS) have repeatedly discussed the need to create and maintain a national database that is set up in accordance with the achievements of modern information technologies and capabilities to build digital repositories. There have been some efforts in this direction. The first attempt to create such a database was made in the 1970s. Work on the task was initiated, but remained unfinished. Another attempt to create an archive of passports of the conducted empirical sociological research was made in 2004. In the same year at the Institute of Sociology an attempt was made to create a database relating specifically to social mobility in Bulgaria, but this project also remained unfinished due to lack of funds and perhaps lack of understanding of the importance of the task.

Goal and aims of the Bulgarian National Development Plan

In the age of a globalized society and an increasing number of social surveys conducted every year, the problem of storing, management and access to social research databases is becoming ever more pressing and imperative. In Bulgaria there is a significant number of state, public and private institutions which are engaged in the study of social phenomena and processes. As a result of numerous social studies (sociological, social-psychological, demographic, economic, etc.) every year these institutions collect empirical data on a wide range of indicators concerning various aspects of Bulgarian society. The aim of the National Development Plan is to work towards the establishment of a national data service in the social sciences in Bulgaria that is expected to **have value and impact on the national scientific community.**

Mission

The overall mission of **the National Data Service (NDS)** is the solicitation, acquisition, preservation, management, and delivery of data collected through Social Survey Research held since 2000 in Bulgaria by research and other institutions and covering major topics of the social agenda.

A larger vision or philosophy of NDS will be to take into consideration all data being produced by research teams and focused on studying basic socio-economic topics of Bulgarian transitional society. Usually data are produced with very specific goals, but in the context of NDS more important will be to make these data visible and easy for access, in order to promote correct scientific usage of research data and make them applicable for the purposes of public policy design.

General features of the data service

Definition of organisation

The National Data Service (NDS) will be a unit of **the Institute for the Study of Societies and Knowledge at the Bulgarian Academy of Sciences (ISSK-BAS)**. ISSK-BAS will play the role of the national collector and provider for Social Survey Research data collected by Bulgarian research and scientific institutions in the domains of Social sciences and Humanities.

ISSK-BAS was founded in 2010, bringing together the research experience of scientists from the Institute of Sociology (founded in 1968), the Institute for Philosophical research (founded in 1945), and the Centre for Science Studies and History of Science (founded in 1972). ISSK-BAS is the main national research centre in the sphere of social sciences (for more details see ISSK-BAS' website: <http://issk-bas.org>).

Scope of collection

This section defines the nature and scope of the data that will be included in the future NDS collection. The main object of data collecting will be social surveys conducted since 2000. In collecting and managing social survey data, priority will be given to those surveys which are directly connected with data driven for the purposes of Sociology, Political Science, Educational Science, Economic Science, Psychology Science and other subdivisions of Social and Political sciences. Attention will be paid to those surveys which cover all major aspects of socio-economic life of contemporary Bulgarian Society.

In collecting social survey data, ISSK-BAS will take into consideration both qualitative and quantitative data. Recently conducted studies in Bulgaria have applied both qualitative and quantitative research methods. ISSK-BAS will give to both of them equal chances for being a meaningful part of the NDS. In our understanding, both qualitative and quantitative research methods produce valuable and highly applicable research data. **The secondary use of data should be done with a clear awareness of their cognitive applicability and limits. Only in**

this case the data will serve as reliable source for visibility and setting the social agenda.

ISSK-BAS will encourage collecting both “big” data (data driven from nationwide surveys) as well as other data (traditional scale data). As of territorial survey coverage, ISSK-BAS will pay attention mostly to the national representative surveys, although local surveys also will be taken into consideration and those available surveys will be chosen, which meet all basic methodological standards. Very often the scope of the data received depends on the project activities definition, in the framework of which these data have been produced. In our experience, much social survey research in the social sciences are focused on studying either several major aspects of socio-economic life, or some particular focus of social reality.

Services and activities to be provided

This section names and describe the services that will be offered by the ISSK-BAS in its capacity of NDS.

ISSK-BAS will develop and deliver the following main services:

- » solicitation and acquisition of the data from data providers;
- » curation and long-term preservation of data;
- » online catalogue of archived data; and
- » access to and dissemination of data for use in secondary analyses.

ISSK-BAS will guarantee covering a number of additional services and activities, as follows:

- » elaboration of material and trainings delivery for data depositors (how to prepare data for inclusion in the data archive and how to correctly deposit the proposed data);
- » elaboration and trainings delivery for data users (how to find needed data in the data catalogue and how to download them);
- » support, assistance and advice for data depositors and data users;
- » promotional activities and outreach to users;
- » data management training for researchers;
- » establishment of a regional network;
- » establishment of networks of data users;
- » elaboration of data services covering the needs of data users;
- » possibilities for online searching survey data and sorting them (data compilation) in

- regards of the data users needs;
- » possibilities for ad hoc research teams creating - in regards to the needs of Bulgarian society and social agenda;
- » possibilities for data extraction for the purposes of preparation of scientific publications; and
- » establishment of ad hoc research teams for the purposes of "hot" topic surveys covering.

ISSK-BAS will focus serious attention on providing to the data users the following basic analytical services:

- » creation and maintenance of research inventory of existing research projects in the country. Attention will be given both to the projects with or without data);
- » access to online tools for data analyses and statistical analyses (creating frequency tables, cross tabs, Cramer and Chi-square, graphs, and others statistical indicators and analytical results);
- » purchased access to foreign databases (ICPSR and LIS) for national researchers); and wider promotion of "Open Access" to data.

Beneficiaries

The beneficiaries of the NDS could be grouped into several major categories:

- » university researchers, teachers and students;
- » secondary school teachers and students;
- » researchers from other public institutions (scientific institutes, government agencies and others)
- » researchers from private institutions (private research agencies, NGOs, business associations, newspapers);
- » policymakers;
- » journalists; and
- » the general public.

Governance structure

The purpose of this section is to define the main bodies and key stakeholders that will be involved in the governance of the data service, including their role, responsibilities, and composition.

The ISSK-BAS National Data Service (NDS) will establish a three-stage governance structure:

1. An Executive Board

- » NDS Director: will be responsible for overall governance, coordination and control of NDS activities, under the supervision of the ISSK-BAS Director and ISSK-BAS Scientific Board. The NDS Director will be the motor of basic NDS activities for solicitation and data acquisition.
- » Representative of ISSK-BAS: will support the NDS Director in its governance of the NDS activities.

2. An Oversight Board

- » Representatives of relevant ministries to data producing and data reservation. For the purposes of the NDS, several ministries could be asked for their representatives designation, i.e. Ministry of Education and Science, Ministry of Labour and Social Policy, Ministry of Regional development and Public Works, Ministry of Economy, Ministry of Finance and others;
- » Representatives of the National Statistical Institute: will play a consultative role in data solicitation and acquisition process;
- » Representatives of National Archives;
- » Representatives of research Councils and national science foundations;
- » Representatives of Universities.

3. An Advisory Board:

- » Leading Bulgarian researchers of international standing in Social Science and Humanities;
- » Representative of CESSDA service providers;
- » IT specialists.

Financing schemes

This subsection define specific financial schemes for the different stages of the NDS operations:

1. Establishment of financial resources

- » ISSK-BAS will try to attract funding through possibilities of Horizon 2020 and other European instruments, as well as through national financial instruments; Representative

of CESSDA service providers;

- » National institutions such as the National Statistical Institute and the Ministry of Science and Education.

2. Financial resources for NDS functioning

- » NDS's successful functioning will be maintained by financial support of national institutions. So far this issue is a subject of discussion but initial debate has been started and will be continued until the proper solution is found.

The NDS, as a national infrastructure, should be financed from public funds to ensure its long-term operation and sustainability. The possible funding sources for the data service are the Ministry of Science and Education. Additional funds will be provided by domestic and international funding organisations.

The financing model for the establishment phase should be different than the model for financing day-to-day operations after the establishment of the data service. During the establishment phase the costs for procuring office and technical equipment have to be considered. Once the service is established, the regular budget should cover the costs for staff and maintenance of technical infrastructures, and also the membership in CESSDA to ensure connectedness with the European community of social science data archives and to be able to receive support from this community.

Resources and challenges

Host institution of the future data service

Founded in 2010, ISSK-BAS is the main national research centre in the sphere of the social sciences. The institute conducts complex theoretical and empirical, fundamental and applied research devoted to knowledge, values, and human society. This is conducted in accordance with the academic criteria established at national and European level and reflects world trends in science. The activities of ISSK-BAS include providing expert and consultancy services for the needs of governance and organization in all spheres of social practice related to the requirements of the socio-economic, cultural, and political development of Bulgaria. The scientists at ISSK-BAS have rich experience in national and international projects, EU FP6 and FP7 research projects included. Some of the priority research topics are the inequalities in the context of socio-economic change, youth, job quality and quality of life, and the knowledge society, i.e. science, education, and innovation.

ISSK-BAS enjoys the prestige of a national academic institution that specializes in the development of methodological approaches and conducting social research on the ongoing social processes in Bulgaria. In the light of the public mission and functions of ISSK-BAS, the entrusting of these new specific functions to CESR follows completely logically and realistically.

Indeed, one possible decision is an expansion of the activities of the existing Social Survey Research Center (SSRC) at the ISSK-BAS, with new functions in order to provide storage and dissemination services for empirical social research data. CESR is part of the ISSK-BAS structure and has more than 40 years of history, rich institutional, methodological and research traditions, and experience in working with empirical data from sociological and other studies. The enhancement of the existing functions of CESR requires the creation of partnerships in order to construct relevant conceptual approaches, software solutions and the formation of the skills necessary to work with them.

ISSK-BAS has the expert capacity (22 professors, 44 associate professors, 109 PhDs), that allows undertaking specific tasks for assisting the project team in the implementation of the concept for Internet infrastructure designing. ISSK-BAS has also in-house all the necessary technical equipment to implement international research projects. ISSK-BAS is a partner in the National Consortium of the European Social Survey, a national partner in the SHARE project, which both have status of European research infrastructures. Additionally, ISSK-BAS has experience in organization and implementation of representative national surveys, and international surveys like the Generations and Gender Survey (2002, 2005) and the European Social Survey (2008, 2009). We have established contacts with the Norwegian Center for Research Data and have made attempts to become a partner of the Archive for databases in social sciences with a hub in Bergen, Norway.

Additionally, ISSK-BAS has the scientific capacity and rich experience in the creation and administration of empirical data from social research, and it commands a complete base of professional skills, scientific expertise and national network of interviewers for conducting local and national empirical social research. This base would facilitate the expansion of the existing activities of SSRC with new functions for storage and management of data, including the provision of specialized services to users of data for research purposes.

We see the practical and scientific benefits from the expanding of the activities of CESR with new functions for storing and managing social research data in the following:

1. Firstly, centralized organization and storage of data will provide the widest possible access

to their use by interested researchers, research teams and institutions.

- » ISSK-BAS will try to attract funding through possibilities of Horizon 2020 and other European instruments, as well as through national financial instruments; Representative of CESSDA service providers;
- » National institutions such as the National Statistical Institute and the Ministry of Science and Education.

2. Secondly, organization and storing of data will be carried out using the most modern technologies in this field, which will create optimal conditions for their effective use in several ways:

- » by expanding the opportunities for research and generalizations based on research data;
- » it is presumed that the creation and maintenance of such a center would provide significant cost savings in the operation of the system;
- » there will be an improvement in the quality of research in the social field and its benefits to society;
- » there will be an intensified exchange of technological and methodological training of researchers;
- » there will be an expansion of the opportunities for international exchange of the collected information;
- » in all cases the access and use of the database will be better organized, significantly easier and timesaving.

Human resources

The NDS should employ relevant experts in data management and data archiving. They will be responsible for all aspects of the archiving workflow, including data solicitation, curation, and dissemination. The data experts should optimally have a background in social sciences and information sciences, but could also have a background in related disciplines, such as data science or statistics. Main activities of a data expert include: solicitation of data, data and documentation processing (ingest), data curation and preservation, dissemination of archived data, creating contracts for data depositors and data users, providing information and advice to researchers and students.

Partner support and cooperation

In the frame of National Data Resources Plan, ISSK-BAS will make all efforts necessary for establishing a National Consortium of the institutions producing and working with survey data. Most probably, these institutions would be the National Statistical Institute, the Bulgarian Sociological Association, the Faculty of Sociology at the Sofia University "St. Kliment Ohridski", the Faculty of Sociology at South-West University, the Faculty of Sociology at the University of National and World Economy, the Faculty of History, Philosophy and Sociology at the D. A. Tsenov Academy of Economics – Svishtov, as well as the Faculty of Economic and Social Studies at the Plovdiv University "Paisii Hilendarski. At the first stage, potential interests and needs of partners will be identified, joint activities will be discussed, and as a result of negotiations an Agreement for Joint Activities will be signed.

Afterword

This plan is a blueprint for a future national archive with the long-term aim of becoming a member of CESSDA ERIC. While this National Development Plan will certainly evolve over time, it represents a significant first step in defining concrete goals, priorities, and an organisational structure.

The NDP for Bulgaria has been drawn up by the Institute for the Study of Societies and Knowledge - Bulgarian Academy of Sciences (ISSK-BAS). The contact person on behalf of ISSK-BAS is Prof. DSc. Emilia Chengelova (chengelova@gmail.com).

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